The Agency Onboarding Guide

LinkedIn

Guide Objective

At LinkedIn Marketing Solutions, we help business grow. Because, big picture, customer growth drives business growth which drives economic growth. This guide details the steps you need to take to get started with LinkedIn as an agency. Whether you're looking to understand how to run campaigns as an agency, where our case studies may live or even what your billings options are, this guide is your go-to resource.

To see what we've been up to, check out our case studies where you can filter by industry, product and more.

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Why does LinkedIn matter?

For the first time in the history of media, you can reach the world's professionals—all in one place. As the largest global community of business professionals, LinkedIn is the premier destination for finding and sharing professional content. Members come with purpose - a very different mindset and intent from other social media platforms.

Platform Stats

As of 2020, LinkedIn is now at **706 million members globally**, and growing at a rate of 3 new members per second. These professionals worldwide gather on LinkedIn to stay connected and informed, advance their careers, and work smarter.

358 billion
content impressions

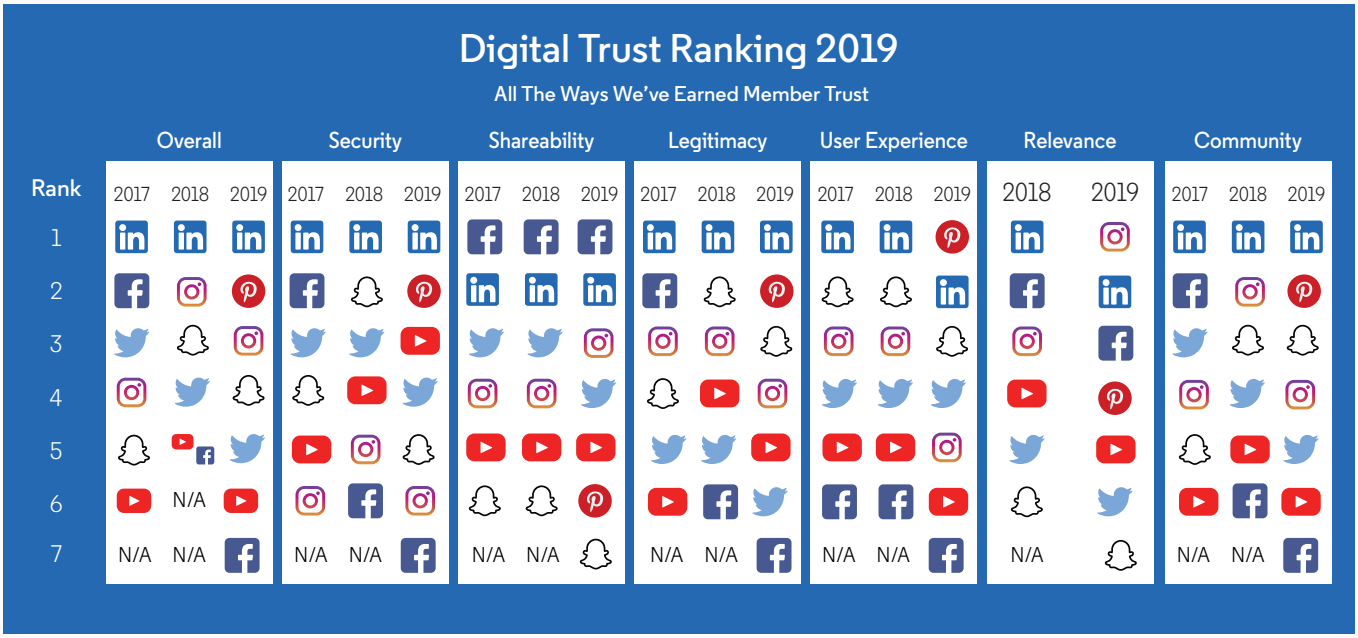
31 million+
job seekers visit LinkedIn Jobs every week

21%
revenue increased with continued strength across all businesses

The Most Trusted Digital Platform

According to the Business Insider Intelligence survey, LinkedIn came in as the most trusted platform for the third year in a row (2019) - and an outlier in the overall survey results - LinkedIn took the top spot for nearly every pillar of trust — and there are a few reasons why:

- LinkedIn continues to benefit from the professional nature of its community — users on the platform tend to be well behaved and have less personal information at risk, which makes for a more trusting environment.
- LinkedIn users are likely more selective and mindful about engagement when interacting within their professional network, which may increase trust in its content.
- Content on LinkedIn is typically published by career-minded individuals and organizations seeking to promote professional interests, and is therefore seen as higher quality than other platforms'. This bodes well for advertisers and publishers to be viewed as forthright, honest, persuasive, and trustworthy.



LinkedIn Business Lines

Product	Description	User Cases
Hire	Attract talent and recruit candidates from the world's largest talent pool	Recruiters, Human Resources, and Recruiting Agencies looking to build talent brand, post jobs, and source candidates
Market	Market to the world's largest professional audience	Marketers, Ad Agencies, PR/Communications Teams looking to build their brand and promote their product or service through paid media efforts
Sell	Power your social-selling efforts with real-time sales intelligence	Sales Team, Business Development, and Executives looking for a sales tool to target the right buyers, understand key insights, and engage with personalized outreach
Learn	Develop talent and keep skills current with personalized online learning	For individuals, Learning & Development, and Talent Development Teams looking for an online learning platform that enables individuals and organizations to achieve their objectives and aspirations through thousands of expert-taught online courses

Click here to see more information on our business lines.

How do I get started with LinkedIn Marketing Solutions?

1. Start with a LinkedIn Page

Start with a LinkedIn Page. LinkedIn Pages are a free and easy way to establish your brand on LinkedIn. All you need to get started is a LinkedIn account and a verified email address (we'll verify if you're eligible to create a Page on your company's behalf). Having a LinkedIn Page is required to run Sponsored Content and Message ads. Learn how to get started or create a free LinkedIn Page.

Check out the LinkedIn Marketing Success Hub for education, inspiration, and ideas.

2. Determine your Objective

No matter your marketing objective, LinkedIn provides a full suite of products and features to allow you to reach those goals. Learn more about each Campaign Objective here.

The below chart outlines the appropriate ad products to deploy based on your campaign objective.

Objectives	KPI	Product	Recommended Targeting
Awareness	Brand awareness	Sponsored Content , Message Ads, Dynamic Ads	First-party demographic & interest targeting, LinkedIn Audience Network
Consideration	Website visits	Sponsored Content, Dynamic ads Message Ads, Text ads	Lookalike audiences & audience expansion
	Engagement	Sponsored Content, Dynamic Ads, Message Ads, Dynamic Ads,	
	Video views	Sponsored Content	
Conversions	Lead generation	Sponsored Content, Dynamic Ads, Message Ads, Lead Generation Forms*	Matched audiences & retargeting
	Website conversions	Sponsored Content, Dynamic Ads, Message Ads, Text Ads, Conversion Tracking*	
	Job applicants	Sponsored Content, Dynamic Ads	

3. Get to know LinkedIn's Ad Product Solutions and Targeting

Below is our full suite of advertising solutions and capabilities:

- Sponsored Content (single image, carousel and video ads in the feed)
- Message Ads (message ads that show in LinkedIn inbox)
- Text Ads (right rail and top banner ads, desktop only)
- Dynamic Ads (follower, spotlight and content ads, desktop only)
- Targeting Capabilities + Targeting Playbook

Head over to the Marketing Solutions homepage and hover over "Advertising" to see the full list of products, features, and more.

	Post Type	Placement	Bid Type	3rd Party Measurement
Sponsored Content	Video Ad	Desktop Mobile	Automated, CPC, CPM, CPV	Moat - (Video Ads Only) Google Ads Manager Acxiom Sales Lift Analytic Partners Media Mix Modeling Brand Effects with Neilsen
	Single Image Ad		Automated, CPC, CPM	
	Carousel Ad			
	Single Job Ad			
Dynamic Ads	Spotlight Ad	Desktop	CPC, CPM	
	Follower Ad			
	Jobs Ad			
Text Ads	Text Ad	Desktop	CPC, CPM	
Sponsored Messaging	Message Ad	Desktop Mobile	CPS	
	Conversation Ad			

4. Create a Campaign Manager Account

Campaign Manager is the all-in-one advertising platform on LinkedIn. You can set up ad accounts, run campaigns, and control your budget as soon as you sign in. All you need is a personal LinkedIn account to get started. See the next section for agency-specific instructions.

How do I run campaigns, as an agency?

As an agency, you can either create a new ad account in Campaign Manager to run campaigns on behalf of your client, or you can request access to your client's existing ad account (if they have one). The proper way to set-up your Campaign Manager is to grant individual agency employees access to each ad account using their LinkedIn profile URL. Campaign Manager does not currently open an agency-wide login feature.

Do not create a shared agency profile, as this is against our terms of service and shared profiles will be deactivated. Once the fake profile is flagged, all ad accounts the profile has been permissioned on will be marked as spam, which will pause all active campaigns. LinkedIn will not reactivate the fake profile, however the ad account can be reactivated only after the fake profile is removed.

In case of agency employee turnover, we recommend making sure at least two agency employees have account manager access to every ad account to prevent getting locked out.

To create a new ad account

1. Sign in to your personal LinkedIn.com account.

2. Click the Work icon at the top of your LinkedIn homepage and select Advertise.

3. Click Create ad.

4. Select the type of ad you want to run. Click Learn more to see a description and image for each ad type.

5. Enter the new ad account name in the Account name field. A name will populate can be changed later.

6. Select the currency to be used for billing from the Currency dropdown. The currency can't be changed once the account is created.

7. If you'd like to link a Company or Showcase Page to your campaign:

    - Select the icon next to Yes.
    - Select the icon next to Search by name or URL.
    - Enter the Company Page name or URL in the text field. (To link school/showcase Page, please search for it by name and select the right one from the dropdown.)
    - Select your Page from the dropdown.

Note: An ad account must be linked to a Company Page in order to run Sponsored Content and Message Ad campaigns.

To add agency employees to an ad account

1. In campaign manager, within your selected account, click on the settings icon, top right hand corner, and select manage access.

2. Click on Edit to grant access. There are various User Roles and Functions in Campaign Manager to choose from. Note: You can only add people who are 3rd-degree connections or less.

Permissions Required by Ad Type

Depending on the type of ads you will be running, you may need to request additional access levels from the client. The below chart lists the access level required for each ad product:

Access Needed For	Sponsored Content	Sponsored Message Ad	Text Ads, Dynamic Ads	Lead Gen Forms
Ad Account	Account Manager or Campaign Manager	Account Manager or Campaign Manager	Account Manager or Campaign Manager	Account Manager or Campaign Manager (to create lead gens forms)
Client's Company Page (only a current Page admins can grant access)	Co. Page Admin or Sponsored Content Poster	Not required	Not required	Co. Page Admin or Lead Gens Forms Manager (needed to view/download leads data)
Message Ad Sender	N/A	Request client's permission to add them as the Sender's Name (detail's below)	N/A	N/A

If you will be creating Sponsored Content campaigns on behalf of your client, you will also need permission to their Company Page from the Page Admin. The Company Page admin must be a 1st degree connection with whomever needs access. Upon connecting with each other, the Page admin grants the required access. Agencies can request "Sponsored Content Poster" access if full admin access is not needed.

If you plan to send Message Ads on behalf of an employee at your client's company, you will need to add that employee as a Sender to the Sponsored InMail campaign. You need to be 1st degree connections with that person. More on adding and changing senders to your campaign here. Note: Message Ads can only be sent from a company name if you are working with a LinkedIn account executive.

How To Create Campaigns (Video Demos

Campaign Manager is now using the objective-based advertising experience, a streamlined format for LinkedIn Ads campaign creation that leads with marketer's goals.

You can utilize the new objective-based campaign creation experience when you click the Create Campaign button in your Campaign Manager.

Below are links to key how-to videos from the LinkedIn Marketing Solutions YouTube Channel which guide you through various objectives and ad products in Campaign Manager:

Video Topic
How to Select Your Campaign Objective
How to Set Up Your Target Audience
SC Engagement (Follower) + Image
SC Lead Gen + Single Image
SC Lead Gen + Carousel
SC Lead Gen + Video
Insight Tag + Website Demographic
Conversion Tracking + Apply to Campaigns
Message Ad Lead Gen
Matched Audiences (Retargeting, List Uploads, Connecting to APIs)
Reporting - Dashboard Overboard

Pro Tip! Install the LinkedIn Insight Tag

The LinkedIn Insight Tag is a piece of lightweight JavaScript code that you can add to your website to enable in-depth campaign reporting and unlock valuable insights about your website visitors.

The data collected from the Insights Tag powers:

- Conversion tracking
- Website re-marketing audiences
- Website visitor professional demographics
- Additional insights about members interacting with your ads

Learn how to set up the LinkedIn Insight Tag.

The event-specific image pixel tracks conversions without associated Pages, such as through web forms that do not have thank you pages. You can also use the event-specific image pixel option to track on-click events. This method requires you to install code in the appropriate place for each conversion event that you would like to track. Learn more about setting up an event-specific image pixel.

The LinkedIn Insight Tag is supported by many tag management systems. Check with your tag management vendor to ensure that the LinkedIn Insight Tag is compatible, or follow the instructions in the articles below:

- Google Tag Manager
- Tealium Tag Management
- Adobe Tag Management
- DDX/Coremetrics
- Ensighten/TagMan
- DFA Floodlight

What do benchamrks look like?

General LinkedIn Benchmarks by Product

Benchmarks are based on the previous 3 months of data from all campaigns on LinkedIn globally, as of Nov 19, 2019 they DO NOT guarantee future performance.

Sponsored Content

Single Image Ad	
CTR	0.54%
Engagement Rate	1.00%
Average CPC	$8-$10
Carousel Ad	
Ad Unit CTR	0.54%
Carousel Card CTR	0.20%
Engagement Rate	0.93%
Sponsored Video	
View-Through Rate	33.1%
Completion Rate	19.9%
Video CTR	0.50%
Message Ads	
Open Rate	58.4%
Click-to-Open Rate	3.20%
Text Ads	
CTR	0.025%
Dynamic Ads	
CTR	0.14%
Lead Gen/Conversions	
Lead Gen Form Completion Rate	10.26%
Conversion Rate (Non-Lead Gen Form)	2.50%

Are there any minimum spend requirements? How do I get support?

The minimum spend requirement to run a campaign on LinkedIn is $10 USD/day. Work with your sales reps on how to set budgets based on your campaign goals and audience.

Based on a client's quarterly spend level, individual clients (and the agencies who manage their planning/buying can qualify for support from an Account Executive). This type of support is intended to guide you on optimal campaign setup strategy, in-flight optimizations, and more for that specific client. If you do not have a sales rep or do not know who your sales rep is on a specific client, please work with your Agency Lead. If you don't know who your Agency Lead is and your agency is based in the US, reach out to agencyrequest@linkedin.com and advise on client name, campaign budget, and an outline of your specific needs.

Based on an agency's annual spend levels, agencies can qualify for agency-level support. This type of support is intended to advance the collective agency's knowledge of LinkedIn Marketing Solutions' value and offerings. Again, if you don't know who your Agency Lead is and your agency is based in the US, reach out to agencyrequest@linkedin.com.

What are my billing options?

As an agency, we recommend setting up your ad account with monthly invoicing or with an IO.

Monthly Invoicing (online accounts)

This is the recommended billing method for most account types. Invoicing can be set up for any individual ad account by filling out this web form. Note that this is not an agency credit line. You need to complete this form for each new advertiser your agency onboards. Example of an invoice here. Detailed steps on filling out the webform can be found here starting at "Invoicing Application Definitions" at the bottom.

With invoicing, you have the option to bill the client direct or to bill the agency. Approval is based on credit history. To be eligible, the client must have spent a minimum of $3,000 USD in two consecutive months over the last 12 months. If the agency is the bill-to and/or the client has spent this amount in a separate Ad Account, the minimum may be waived

This form will go directly to our credit and billing team for processing. If additional information is needed, they will follow up with the contact listed on the webform.

Insertion Order

Any account buying through an insertion order requires a dedicated LinkedIn account rep. This is a contractual buy with an agreed upon upfront budget, run dates, and product type and requires a minimum spend of $25k/quarter/client. There is less flexibility in that any changes have to be done by the account rep through a contract amendment and account set up has to be done through the rep.

Cheat Sheet

Online Account vs. IO Account

Benefits of IO (field) based accounts:

LinkedIn account team creates the initial business account

Invoicing is based on actual spend from the month prior

Your campaigns will not spend beyond the end date of the IO

Straight line discounting is included within the same Campaign Manager account

Additional funds may be added on to the IO

We have the ability to pre-bill which means you can invest now and pay later

Considerations of IO (field) based accounts:

- The creation of an IO takes time and a credit check
- If product allocations are made, it requires an amendment and additional credit checks regardless of going through the process at the beginning of the campaign
- We can only run one product in an IO based account. If we add new products like Message Ads or Dynamic Ads, we would need to create net new accounts for each product
- At this time we don't have the ability to group campaigns within an account
- IO invoices report total spend within the account and does not breakout by campaign

Benefits of Online accounts:

The account and invoicing is set up by the client and generally takes 2-5 days

There is no upfront contract/commitment. We simply bill based on actuals from the prior month.*

Early access to betas and pilots as online customers are prioritized in these offerings

Online invoices include more detail and breakout spend by campaign

Online provides you (the advertiser) the greatest level of flexibility because you can run all campaigns (all Ad Products) in a single Ad Account across multiple POs – provided the PO number is included in the campaign name

You can run campaigns (all products) in one single Campaign Manager account (Master Account) across multiple POs - provided the PO number is included in the campaign name

You can create separate "campaign groups" for each of your different initiatives, which will make managing your campaigns MUCH easier

*Online is the same Campaign Manager User-Interface and has the same products and functionality as an IO managed account. This option is a di° erent way to buy media that eliminates the need for paperwork. You will still have the same high-level customer service/support from LinkedIn.

Considerations of Online accounts:

- We cannot pre-bill
- We cannot offer added value within the online account. If added value is granted, it would reside in a separate IO Ad account
- Once monthly invoicing is set up, you cannot go back to credit card payments
- If moving to an Online account, we will have to re-build campaigns/ creative. However, your LinkedIn team is here to help!

Credit Card

This is the quickest way to go live when you create an ad account online. You'll be prompted to enter your billing information as you create a new ad account. Paying with a credit card has no minimums, charges are applied daily if spending more than $100 USD/day; weekly if your balance is $20 USD or more; first of the monthly if your balance is $.01 USD or more. There is no flexibility to change the frequency of charges.

To edit existing billing information:

- Sign in to Campaign Manager.
- Click the correct account name.
- Click the Settings icon next to the account name in the upper right corner of the page and select Billing center from the dropdown.
- Click Manage next to your payment method on the Billing center page.
- Click Edit and enter your new billing information.
- Click Change.

If your account has been placed on hold, follow these steps to remove the hold status.

How do brands build an organic presence on LinkedIn?

LinkedIn Pages empower organizations to engage the world's professional community. Learn more about what a LinkedIn Page has to offer and how to create a Page.

LinkedIn Pages Enterprise Playbook

Find out how the world's biggest companies organize internally, strategize content, and engage their employees to make the most of their LinkedIn Page. To build this playbook, we spoke with Page Admins at Microsoft, Adobe, Oracle and our own internal specialists to discover and pass on the secrets of best-in-class enterprises.

LinkedIn Pages empower your organization to engage the world's professional community. Learn more about what a LinkedIn Page has to offer and how to create a Page.

LinkedIn Pages for Small Business

This action plan makes it simple for smaller organizations to grow their business with LinkedIn Pages. Whether you're a marketer at a mid-sized organization or a small business owner managing your entire online presence, this guide is laser focused on the essentials for organic success on LinkedIn.

Organic + Paid Playbook

This playbook, provides a simple 1-2-3 plan for cultivating an integrated organic + paid strategy on LinkedIn. In it, you'll learn how to:

- Build a compelling organic presence
- Boost your reach + engagement via paid
- Measure, learn + optimize to drive more impact

Requesting access to your client's LinkedIn Page

If you're an agency, social media partner, or a third-party working for a LinkedIn Page customer, we encourage you to reach out directly to the organization or school administrator to determine the LinkedIn Page or Showcase Page admins. You may want to send them instructions for how to add or remove admins.

Important: LinkedIn can't provide Page admin information to members or replace or remove admins. We recommend keeping records of your Page admins and sharing this information with your organization's or school's Human Resources department, in case a former admin needs to be removed or a new admin needs to be added.

Contact Pages Support Team

Is your client looking to merge, rebrand, migrate, or change their Page? Review these guidelines first, then contact the Pages support team with your request or question using the link above.

- Rebranding or Changing the Name of Your LinkedIn Page or Showcase Page
- Deactivating a Page or Showcase Page
- Pages of Acquired Organizations

How do I amplify my brand's executive or employee voice?

LinkedIn Executive Playbook

10 Steps for Leading in a Digital Age -This executive playbook is based on our deep understanding of executives' priorities and constraints, and outlines key ways of leveraging the platform based on your needs.

The Network Effect of Employee Advocacy (Guidebook)

Employees are every brand's greatest asset with the power to build your brand and attract and retain the best talent. But only when they are encouraged to share their passions and expertise within their connected worlds. Your employees want to advocate for you. Learn how to harness the influence of employee sharing in this guide.

Rock Your Profile

Learn how to build a stellar profile and have a strong presence on LinkedIn through your own profile page. Great for all LinkedIn users, from executives to students.

How can I continue to grow my knowledge of LinkedIn Marketing Solutions?

Success Hub

This online resource walks through the set-up for all campaign types and covers: creating effective ads, targeting, bids and budgeting, and measuring results.

Marketing Solutions Help Center

Your one-stop shop for product info, best practices, step-by-step guides, and FAQ's on all LinkedIn marketing products and features

Marketing Labs

Join our LinkedIn experts as they share savvy tips on how to get more from your LinkedIn campaigns. The LinkedIn Marketing Labs, cover a variety of topics, shown below. You'll have a chance to meet with our expert marketing team in an open, informal format. New dates and cities are added throughout the year.

Fundamentals of Advertising on LinkedIn	Building a Content Marketing Strategy	Using LinkedIn's Marketing Tools for Business Growth	Advanced Strategies on LinkedIn	Using LinkedIn for Lead Generation	Reporting	Using LinkedIn's Ad Targeting
Ideal if you're just getting started with LinkedIn ads or want a refresher on the basics of the platform.	Ideal if you're looking to improve your content marketing efforts.	Ideal for those getting started with LinkedIn and seeking ways to amplify their organic strategy on LinkedIn.	Ideal if you're familiar with LinkedIn ads and want tactics to take your campaigns to the next level.	Ideal if you're familiar with LinkedIn ads and want to learn more about lead generation.	Ideal for all levels of ad users looking to better understand campaign performance.	Ideal if you're looking to better understand LinkedIn's targeting capabilities.

Webinars

LinkedIn Ads: Set Up and Basics

Join marketing experts for a webinar on the basics of running successful LinkedIn ad campaigns. This is ideal for customers kicking off their first ad campaign or want a refresh of the ads platform. This is a recurring monthly webinar.

On-Demand Marketing Labs

A library of recorded Marketing Labs. These on-demand recordings cover a variety of topics to help you optimize your strategy on the platform. Check out our main hub to register for an upcoming live session.

Newsletter

Subscribe to the LinkedIn Marketing Solutions blog to receive new guides, infographics, videos, insider tips & tricks, and product release information.

Subscribe to Our Channels

- LinkedIn Marketing Solutions Showcase Page
- YouTube Channel
- Instagram

I need help with... who should I contact?

Marketing Solutions Support Team Contact Us

Use this link if you have questions or issues with anything related to Campaign Manager, ad products, campaign set up, optimizations, or troubleshooting.

Billing Team Contact Us

Use this link for any and all requests or questions related to billing, invoices, changing billing admin, requesting receipts, questions about charges, invoicing set up, etc.

LinkedIn Pages Contact Us

Use this link for any questions or requests related to LinkedIn Pages and Showcase Pages such as - rebranding a Page, merging Pages, sunsetting pages, what to do with an acquired company, and more.

What other resources are available for agencies?

Marketing Partner Program

The LinkedIn Marketing Partner Program is a global community of LinkedIn-approved technology and service providers that marketers and agencies can leverage to save time and improve performance across marketing strategies on LinkedIn.

Technology Partners

Technology Partners have built on the LinkedIn Marketing Solutions APIs to enable you to develop a marketing strategy, activate and optimize campaigns, and measure success. Check out our LinkedIn Marketing Partner Directory.

Grow with LinkedIn Marketing APIs If you're interested in leveraging LinkedIn Marketing APIs to build a custom solution for your organization, you can learn more here.

Content Partners

Industry-leading content creators have partnered with LinkedIn to offer best-in-class content for fueling your LinkedIn programs. These hand-picked content partners have deep knowledge about what content performs best on LinkedIn and the expertise to get it done on time and in budget.

Content partners offer one or both of the following types of content:

- Original Thought Leadership
- Turnkey Content